

Fig. 1

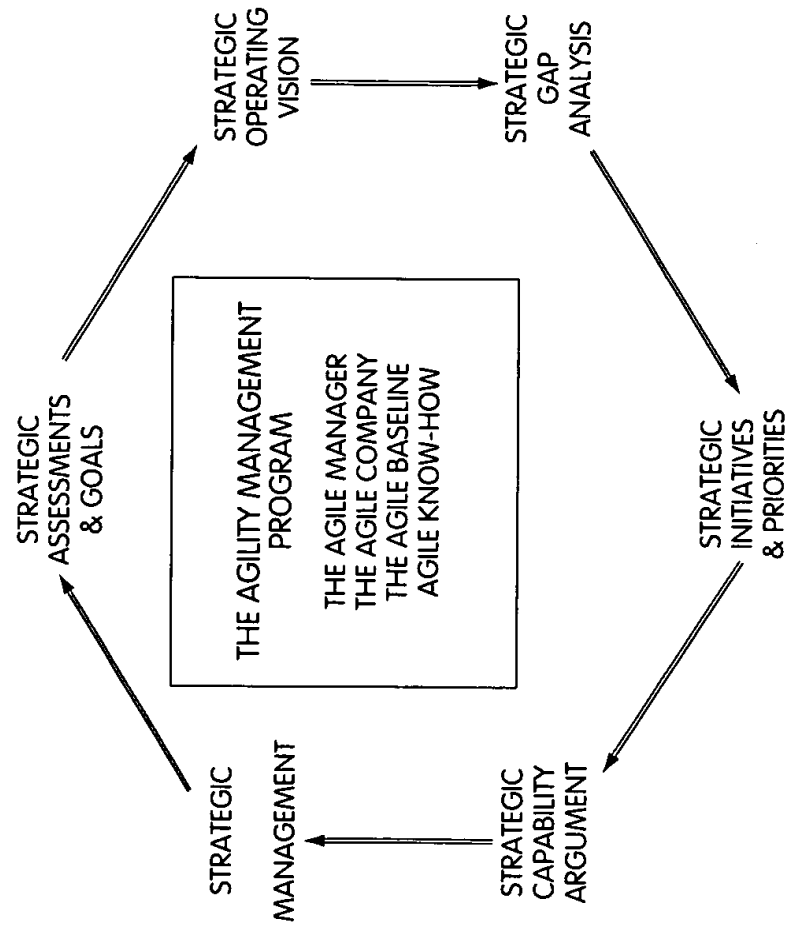


Fig. 2

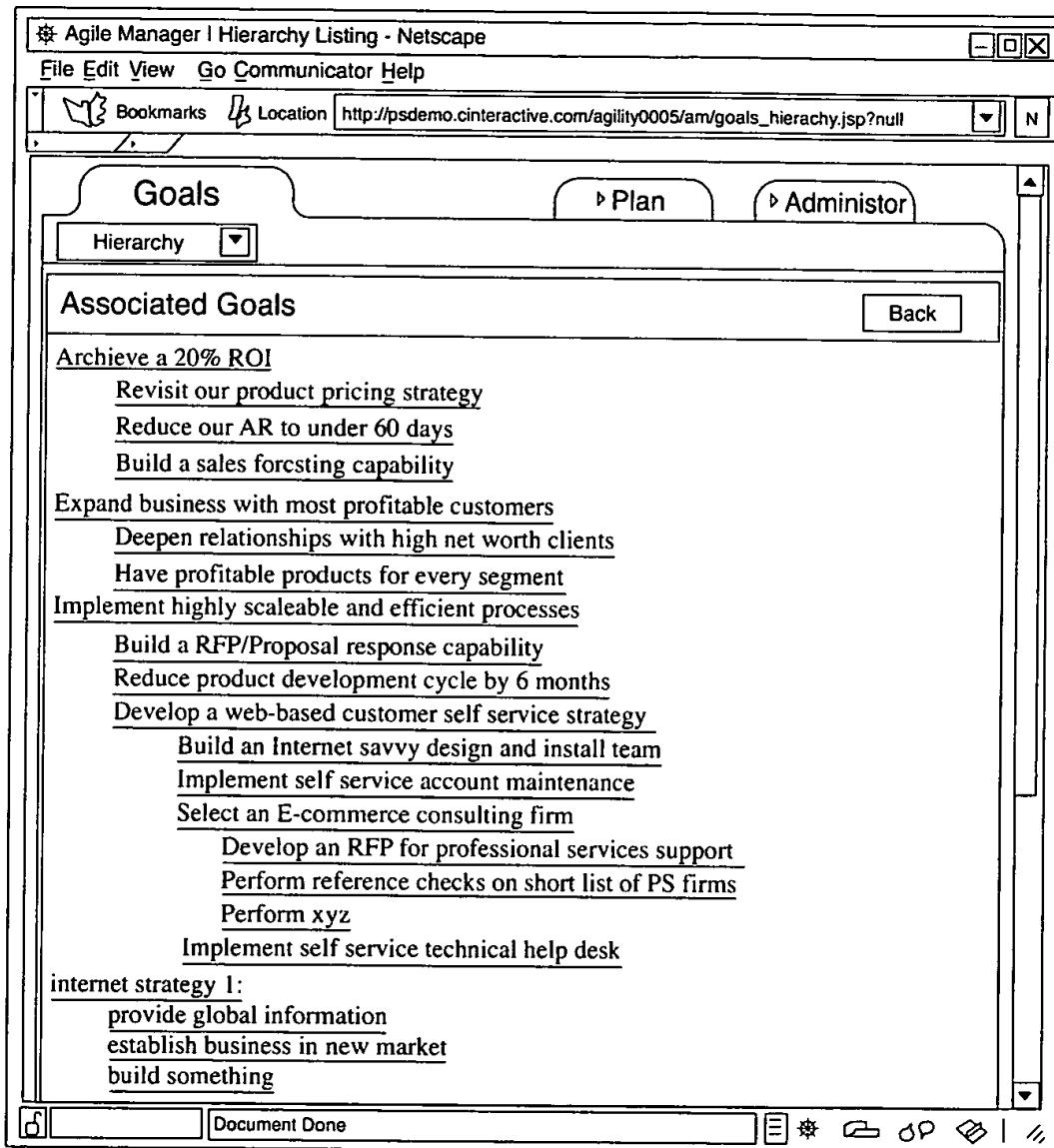


Fig. 3

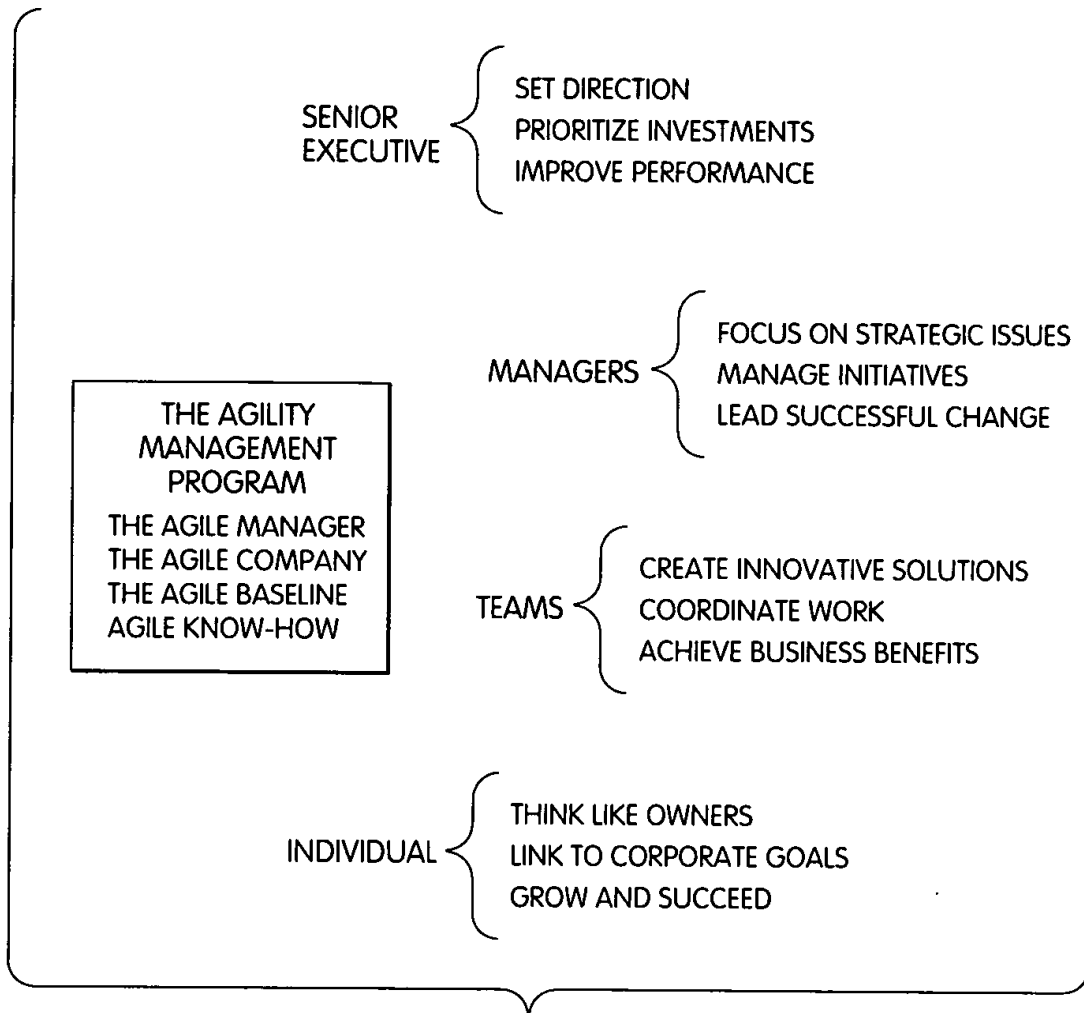


Fig. 4



RESEARCH BASED DIAGNOSTICS REDUCE
ORGANIZATIONAL BARRIERS

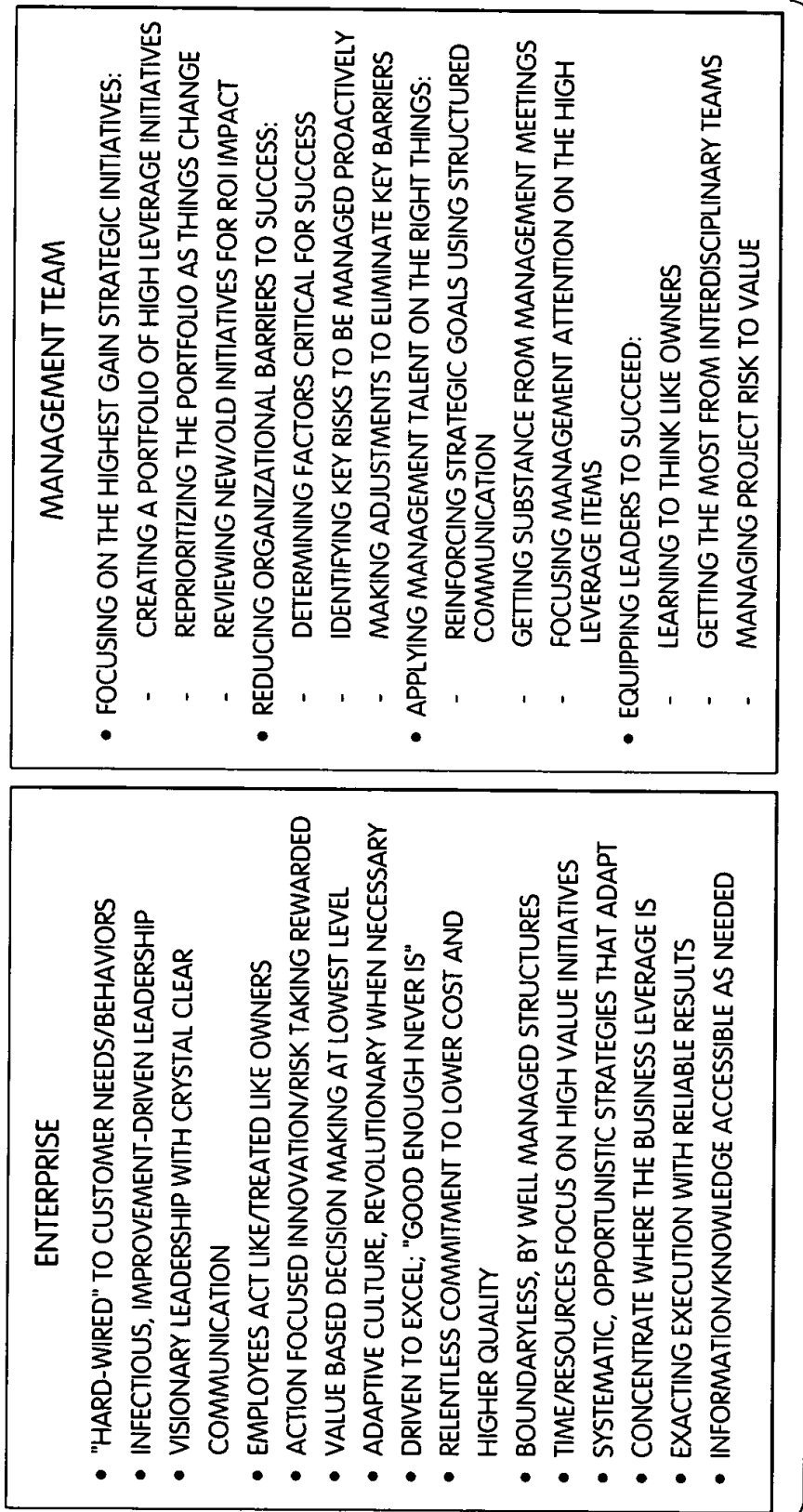


Fig. 5



6/40

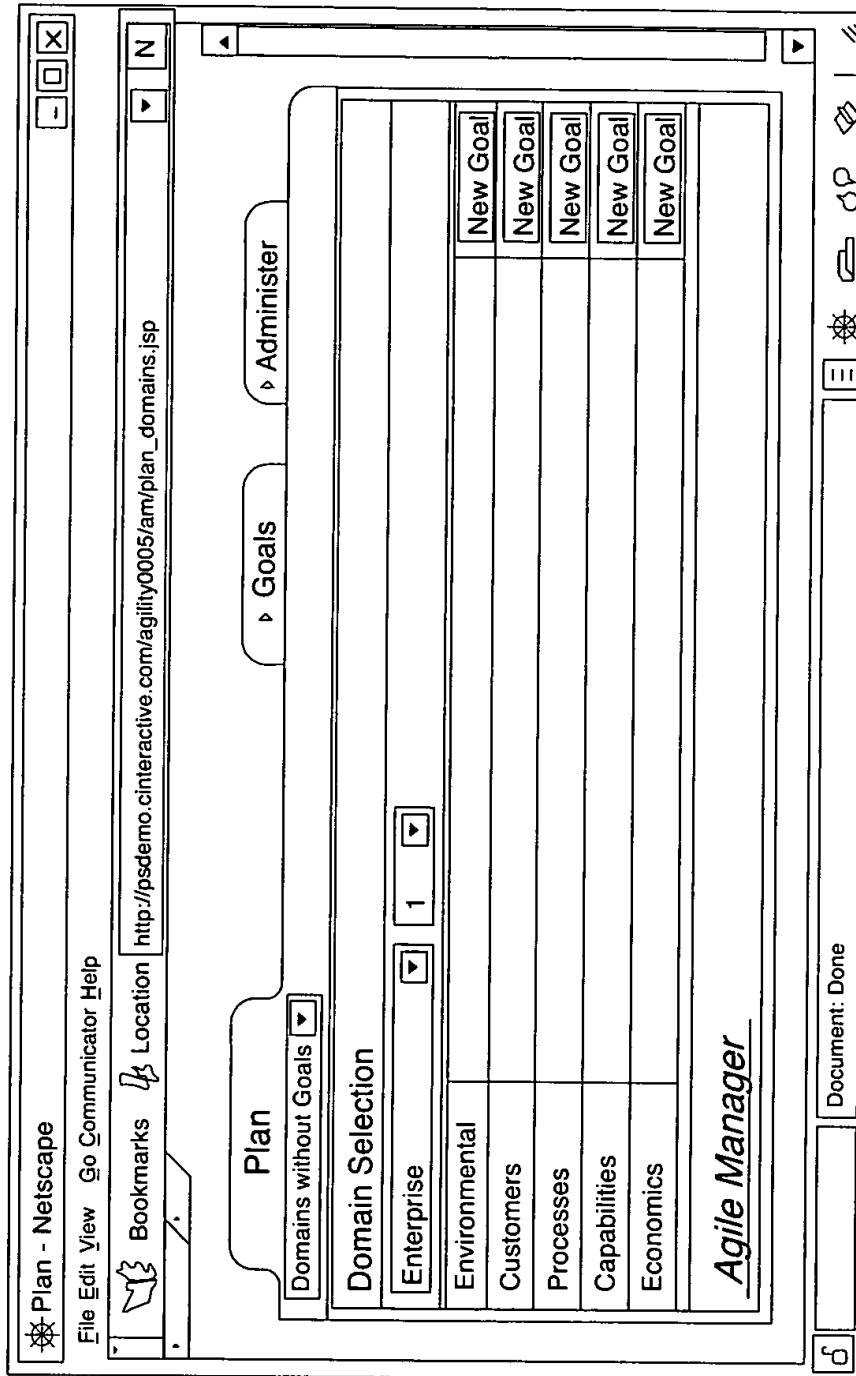


Fig. 6



7/40

A Edit New Goal - Netscape

File Edit View Go Communicator Help

Bookmarks Location ity0005/am/acl_new_project.jsp?parent=PSCDR565336755E10D72891DBEA017F50 N

Add a Contributing Goal

New Goal

Goal Name
New Goal

Goal Objective

Domain: [None] ▼

Status: not started ▼

Priority: 5 ▼

Risk: 5 ▼

Stage: [None] ▼

Due Date: 12/31/99

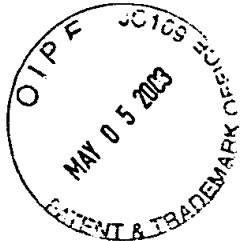
Investment:

Return:

Agile Manager

Document Done

Fig. 7



9/40

Plan - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/plan_domains.jsp

Plan

Domains with Goals

Domain Selection

Enterprise

1

Administer

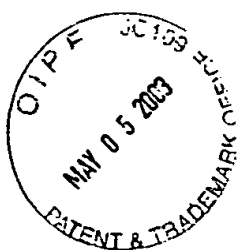
Goals

Environmental		New Goal
Customers	■ Expand business with most profitable customers	New Goal
Processes	■ Implement highly scalable and efficient processes	New Goal
Capabilities	■ Leverage our core competencies	New Goal
Economics	■ Achieve a 20% ROI	New Goal

Agile Manager

Document: Done

Fig. 9



10/40

Values

Title

Business development assesment

Subtitle

current situation vs. desired state

Show Average

1 points

Top Value

7

Number of

6

Animation

Spin Rate

84

Increment

3

OK

Cancel

Clear

Average	Value	Label
5	3	business people vs. just sales people
6.5	2.5	sell solutions not just products
7	4	customer vs. internally focused
6	3.5	business makers vs. order takers
5	4	profitability vs. sales focused
6	4.5	deal well at senior vs. just technical level
5.5	4	world class vs. unacceptable service
7	3	build value based client relationships
0	0	
0	0	

Fig. 10

Business development assessment
current situation vs. desired state

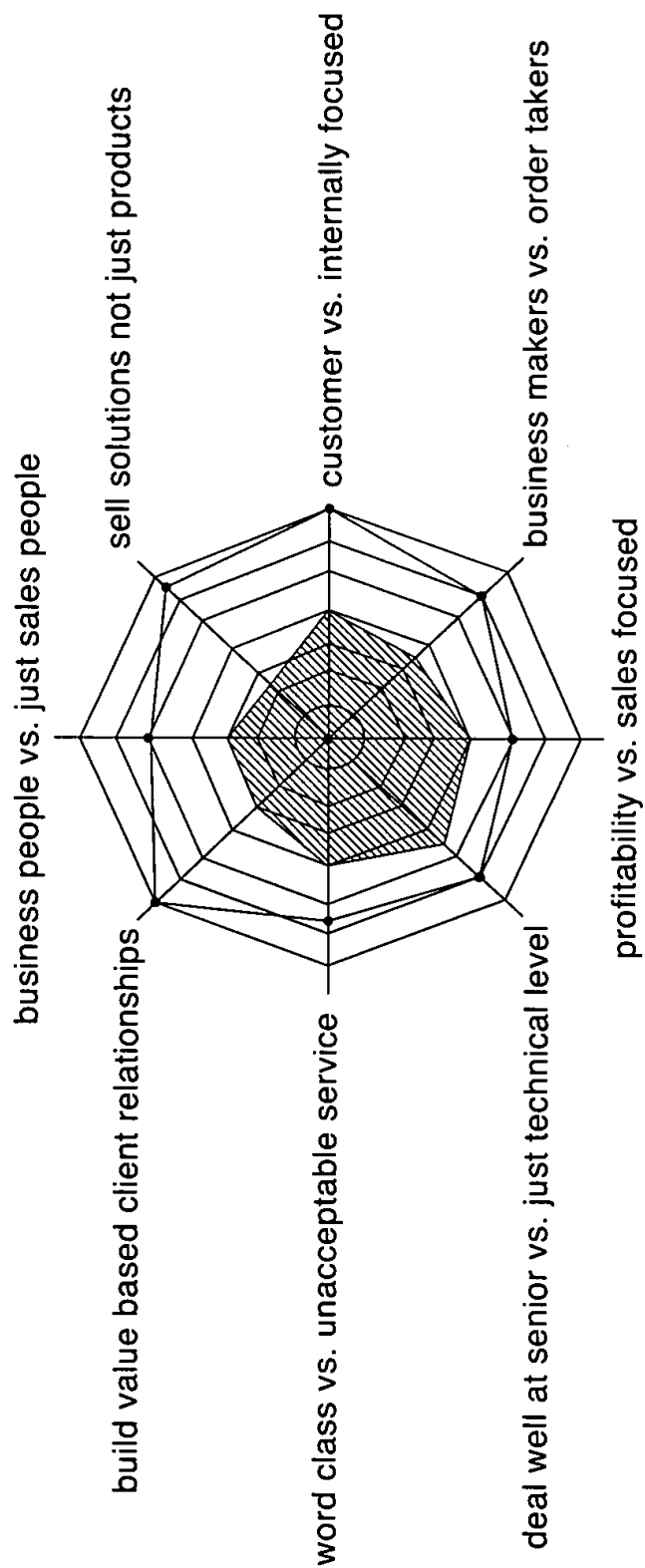


Fig. 11



12/40

Agile Manager | Act | Gap Analysis - Netscape

File Edit View Go Communicator Help

Bookmarks Location: /act_gaps.jsp?domain=&depth=depth&proj=PSCDB565336755E10072391DBEA017F N

Act Goals Plan Administer

Gap Analysis

Expand business with most profitable customers

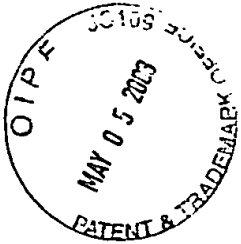
Cross sell and up sell our products to our existing client base from a position of strength.

Enterprise Depth

Domain	Contributing Goal	Actual/Desired	Gap	Add
Environmental				Add
Market Trends				Add
Competitors				Add
Technical Innovation				Add
Regulatory				Add
Customers				Add
Relationships	Deepen relationships with high net worth clients	10/10	0	Add
Products	Have profitable products for every segment	6/10	4	Add
Services				Add
Processes				Add
Core Processes				Add
Product Development				Add
Business Development				Add

Document Done

Fig. 12



13/40

Expand business with most profitable customers | Summary - Netscape

File Edit View Go Communicator Help

Bookmarks Location: /agility0005/arm/act_summary.jsp?proj=PSCDB565336755E10072391DBEA017F30 N

Act Goals Plan Administer

Summary

Expand business with most profitable customers

Parent Goal:

Owner: Doug Beaven

Objective
Cross sell and up sell our products to our existing client base from a position of strength.

Domain: Customers
Status: Onot started
Due Date: 09/01/99
Actual Goal:
Desired Goal:
Gap:
Priority: 5
Risk: 3
Stage: Analysis/Assessment
Investment: \$125,000.00
Payback: \$16,750,000.00

History
(04/14/99) SubProject - Added subproject: Identify clients with the greatest \$ opportunity.
(04/14/99) SubProject - Added subproject: Have profitable products for every segment
(04/13/99) Date - Target date changed to 09/01/99.
(04/13/99) Create - Project created.

Agile Manager

Document Done

Fig. 13

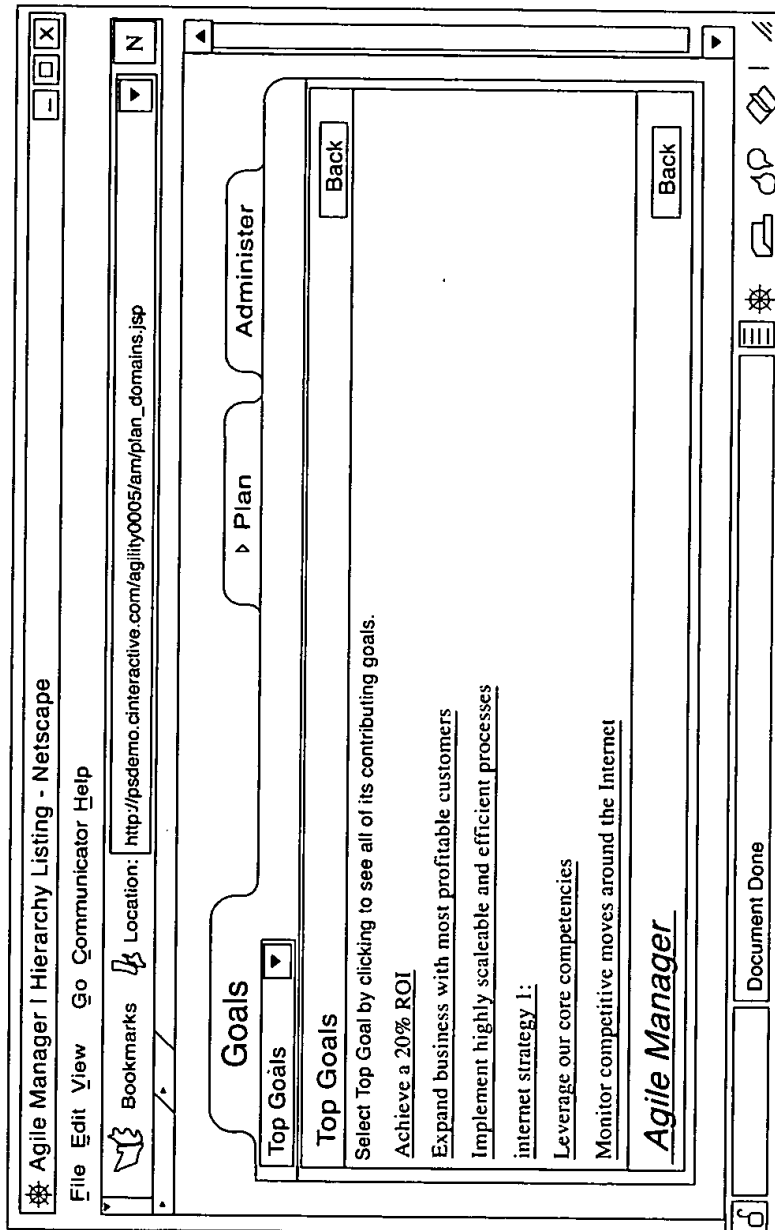
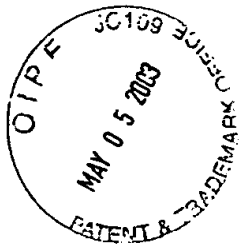


Fig. 14



Goals

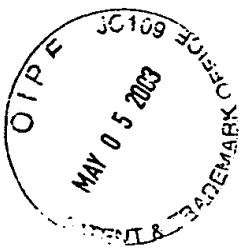
[Select] ▼

► Plan

► Administrator

View Contributing Goals		Show Columns for:		Priority
<u>Expand business with most profitable customers</u>	<u>Cost</u>	<u>Payback</u>	<u>Priority</u>	<u>Due</u>
Deepen relationships with high net worth clients	750,000	5,000,000	5	6w
Have profitable products for every segment	75,000	250,000	5	33w
Top Goal Total:		\$825,000.00	\$5,250,000.00	
<u>Agile Manager</u>				

Fig. 15



16/40

Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp

Goals

[Select] ▼

Plan Administrator

View All Goals

show Columns for: Domain ▼

	Cost	Payback	Priority	Due
Environmental				
<u>New Goal</u>	-	-	5	-
Competitors				
<u>Find new company or spin off threats</u>	5,000	50,000	5	10w
<u>Monitor competitive moves around the Internet</u>	5,000	50,000	3	8w
Technical Innovation				
<u>new internet strategy</u>	-	-	5	-
Customers				
<u>Expand business with most profitable customers</u>	125,000	16,750,000	5	17w
<u>Increase visibility</u>	-	-	5	-
Relationships				
<u>Ask clients about our perceived competencies</u>	10,000	500,000	5	1w
<u>Deepen relationships with high net worth clients</u>	750,000	5,000,000	5	6w
<u>Understand recent competitive wins</u>	1,000	10,000	5	4w
Products				
<u>Have profitable products for every segment</u>	75,000	250,000	5	34w
<u>Resell our back office processing capabilities</u>	50,000	250,000	3	21w
<u>Revisit our product pricing strategy</u>	20,000	1,500,000	5	6w
Services				
<u>Develop a web-based customer self service strategy</u>	450,000	2,800,000	4	21w

Document Done

Fig. 16

Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp

Goals

[Select] Plan Administrator

View All Goals show Columns for: Priority

	Cost	Payback	Priority	Due
<u>Build an Internet savvy design and install team</u>	1,000,000	5,000,000	4	-5w
<u>increase auto adjudication rates</u>	1,000,000	1,250,000	5	86w
<u>Deepen relationships with high net worth clients</u>	750,000	5,000,000	5	6w
<u>Increase our technology R&D capability</u>	555,555	2,000,000	5	34w
<u>Develop a web-based customer self service strategy</u>	450,000	2,800,000	4	21w
<u>Implement highly scaleable and efficient processes</u>	450,000	1,250,000	5	30w
<u>Select an E-commerce consulting firm</u>	300,000	1,000,000	4	4w
<u>Achieve a 20% ROI</u>	250,000	1,250,000	5	34w
<u>Develop an RFP for professional services support</u>	250,000	1,000,000	5	-3w
<u>Recruit and hire world class industry talent</u>	250,000	1,000,000	5	34w
<u>Reduce product development cycle by 6 months</u>	250,000	500,000	4	17w
<u>Implement GSTP by yearend</u>	150,000	10,000,000	5	34w
<u>Expand business with most profitable customers</u>	125,000	16,750,000	5	17w
<u>Implement self service technical help desk</u>	85,000	100,000	4	6w
<u>Build a RFP/Proposal response capability</u>	75,000	100,000	4	8w
<u>Have profitable products for every segment</u>	75,000	250,000	5	34w
<u>Implement self service account maintenance</u>	65,000	2,000,000	4	1w
<u>Resell our back office processing capabilities</u>	50,000	250,000	3	21w
<u>Build a sales forecasting capability</u>	35,000	100,000	4	12w
<u>Revisit our product pricing strategy</u>	20,000	1,500,000	5	6w

Document Done

Fig. 17



18/40

Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp

Goals

[Select] [v]

► Plan ► Administrator

View All Goals

Show Columns for: Status [v]

	Risk	Owner	Stage	Status	Due
<input type="radio"/> Ask clients about our perceived competencies	5	Doug Beaven	Requirements Gathering	not started	1w
<input checked="" type="radio"/> Develop a web-based customer self service strategy	5	Joe Smith	Requirements Gathering	on track	21w
<input type="radio"/> Find new company or spin off threats	5	Doug Beaven	Implement	not started	10w
<input checked="" type="radio"/> Implement GSTP by yearend	5	Doug Beaven	Analysis/Assessment	on track	34w
<input checked="" type="radio"/> Implement self service technical help desk	5	Mike Jones	Business Case Development	on track	6w
<input type="radio"/> Increase out technology R&D capability	5	Joe Smith	Prototype	not started	34w
<input type="radio"/> Increase visibility	5	chris curran	-	not started	-
<input type="radio"/> New Goal	5	Doug Beaven	-	not started	-
<input type="radio"/> Perform xyz	5	Doug Beaven	-	not started	-
<input checked="" type="radio"/> Recruit and hire world class industry talent	5	Doug Beaven	Roll-out	on track	34w
<input checked="" type="radio"/> Reduce our AR to under 60 days	5	Doug Beaven	Implement	off track	8w
<input checked="" type="radio"/> Understand recent competitive wins	5	Mike Jones	Analysis/Assessment	on track	4w
<input checked="" type="radio"/> increase auto adjudication rates	5	Doug Beaven	Build	on track	86w
<input type="radio"/> internet strategy 1:	5	Doug Beaven	-	not started	-

Document Done

Fig. 18



19/40

Agile Manager | Hierarchy Listing - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp

Goals

[Select] ▼

► Plan ► Administrator

View All Goals Show Columns for: Priority ▼

	Cost	Payback	Priority	Due
<u>Expand business with most profitable customers</u>	125,000	16,750,000	45	17w
<u>implement GSTP by yearend</u>	150,000	10,000,000	5	34w
<u>Build an Internet savvy design and install team</u>	1,000,000	5,000,000	4	-5w
<u>Deepen relationships with high net worth clients</u>	750,000	5,000,000	5	6w
<u>Develop a web-based customer self service strategy</u>	450,000	2,800,000	4	21w
<u>Reduce Breakeven on New Business</u>	10,000	2,500,000	4	8w
<u>Implement self service account maintenance</u>	65,000	2,000,000	4	1w
<u>Increase our technology R&D capability</u>	555,555	2,000,000	5	34w
<u>Revisit our product pricing strategy</u>	20,000	1,500,000	5	6w
<u>Achieve a 20% ROI</u>	250,000	1,250,000	5	34w
<u>Implement highly scalable and efficient processes</u>	450,000	1,250,000	5	30w
<u>Increase auto adjudication rates</u>	1,000,000	1,250,000	5	86w
<u>Develop an RFP for professional services support</u>	250,000	1,000,000	5	-3w
<u>Recruit and hire world class industry talent</u>	250,000	1,000,000	5	34w
<u>Select an E-commerce consulting firm</u>	300,000	1,000,000	4	4w
<u>Ask clients about our perceived competencies</u>	10,000	500,000	5	1w
<u>Reduce product development cycle by 6 months</u>	250,000	500,000	4	17w
<u>Have profitable products for every segment</u>	75,000	250,000	5	34w
<u>Resell our back office processing capabilities</u>	50,000	250,000	4	21w
<u>Reduce our AR to under 60 days</u>	5,000	150,000	5	8w

Document Done

Fig. 19



20/40

Goals

PlanAdministor

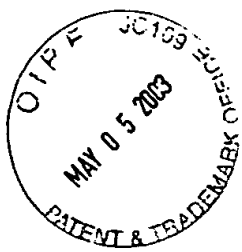
[Select]

View All Goals

Show Columns for: Status

	Risk	Owner	Stage	Status	Due
⊗ <u>Have profitable products for every segment</u>	4	<u>Mike Jones</u>	Requirements Gathering	needs attention	33w
⊗ <u>Monitor competitive moves around the Internet</u>	3	<u>Doug Beaven</u>	Analysis/Assessment	needs attention	7w
⊗ <u>Reduce Breakeven on New Business</u>	4	<u>Doug Beaven</u>	Implement	needs attention	7w
⊗ <u>Develop an RFP for professional services support</u>	4	<u>Joe Smith</u>	Retrospective	completed	-4w
⊗ <u>Perform reference checks on short list of PS firms</u>	4	<u>Doug Beaven</u>	Retrospective	completed	-4w
○ <u>Ask clients about our perceived competencies</u>	5	<u>Doug Beaven</u>	Requirements Gathering	not started	1d
○ <u>Eclipse competition with our e-comm capability</u>	5	<u>Doug Beaven</u>	-	not started	-
○ <u>Expand business with most profitable customers</u>	3	<u>Doug Beaven</u>	Analysis/Assessment	not started	16w
○ <u>Find new company or spin off threats</u>	5	<u>Doug Beaven</u>	Implement	not started	9w

Fig. 20



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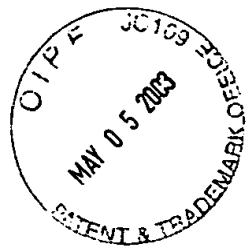
Goals

Plan Administrator

[Select] show Columns for: Status

[Select]		Risk	Owner	Stage	Status	Due
Hierarchy						
Select Domain						
Top Goals						
All Goals						
Alerts						
Search						
New Goal						
Products for	4	Mike Jones	Requirements Gathering	needs attention	33w	
moves around the internet	5	Doug Beaven	Analysis/Assessment	needs attention	7w	
Reduce Breakeven on New Business	4	Doug Beaven	Implement	needs attention	7w	
Develop an RFP for professional services support	4	Joe Smith	Retrospective Review	completed	-4w	
Perform reference checks on short list of PS firms	4	Doug Beaven	Retrospective Review	completed	-4w	
Ask clients about our perceived competencies	5	Doug Beaven	Requirements Gathering	not started	1d	
Eclipse competition with our e-comm capability	5	Doug Beaven	-	not started	-	
Expand business with most profitable customers	3	Doug Beaven	Analysis/Assessment	not started	16w	
Find new company or spin off threats	5	Doug Beaven	Implement	not started	9w	
Increase our technology R&D	5	Joe Smith	Prototype	not started	33w	

Fig. 21



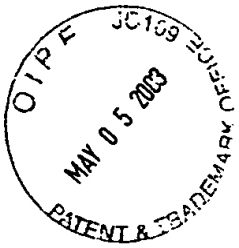
Goals

[Select] ▼

Administor

View Contributing Goals		Show Columns for: Domain ▼			
	Expand business with most profitable customers	Cost	Payback	Priority	Due
	Customers				
	Relationships				
	Deepen relationships with high net worth clients	750,000	5,000,000	5	5w
	Products				
	Have profitable products for every segment	75,000	250,000	5	33w
	Top Goal Total:	\$825,000.00	\$5,250,000.00		
Agile Manager					

Fig. 22



23/40

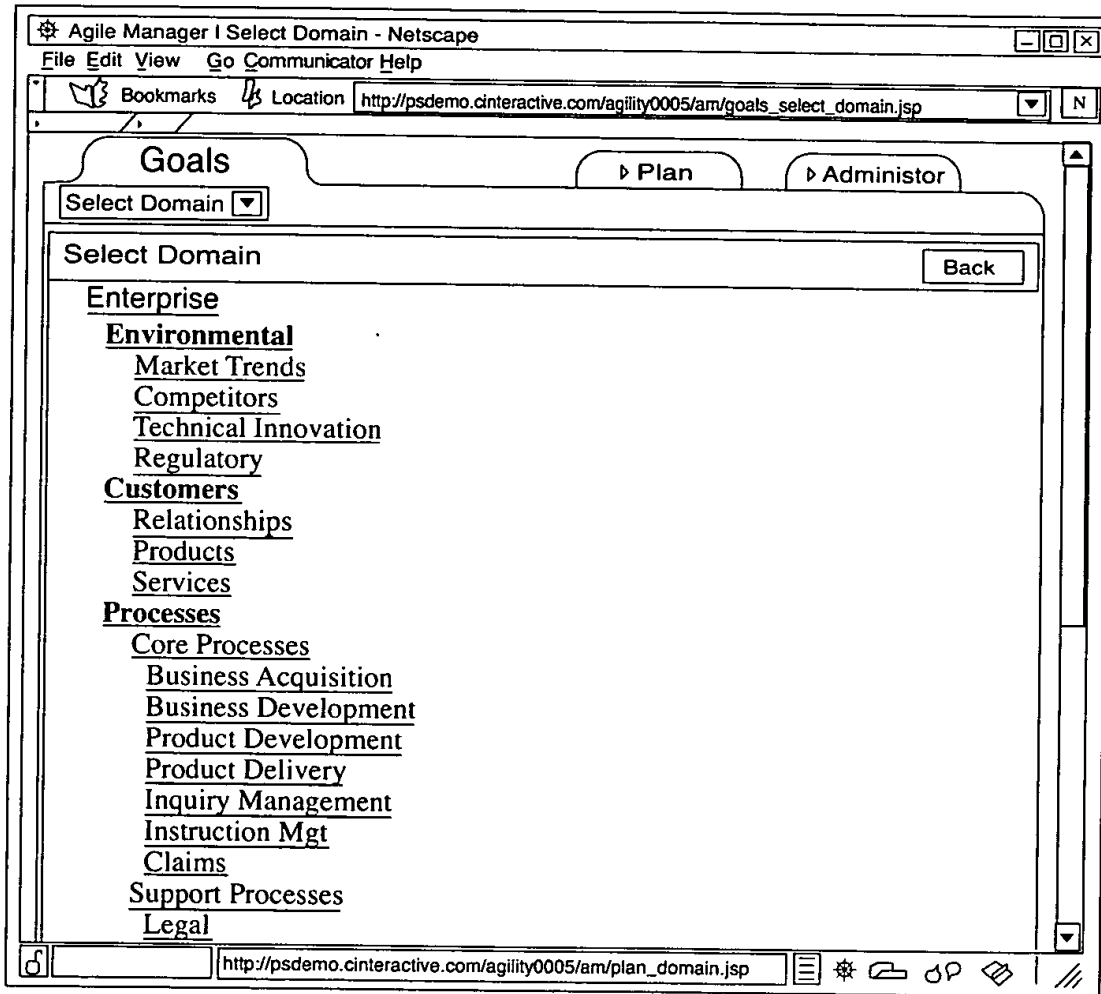


Fig. 23



Plan		Goals	Administer
Domains without Goals ▾			
Domain Selection			
Relationships ▾		Depth ▾	
Relationships		New Goal	
<ul style="list-style-type: none">■ Ask clients about our perceived competencies■ Deepen relationships with high net worth clients■ Understand recent competitive wins■ build the franchise around customer satisfaction			
<u>Agile Manager</u>			

Fig. 24

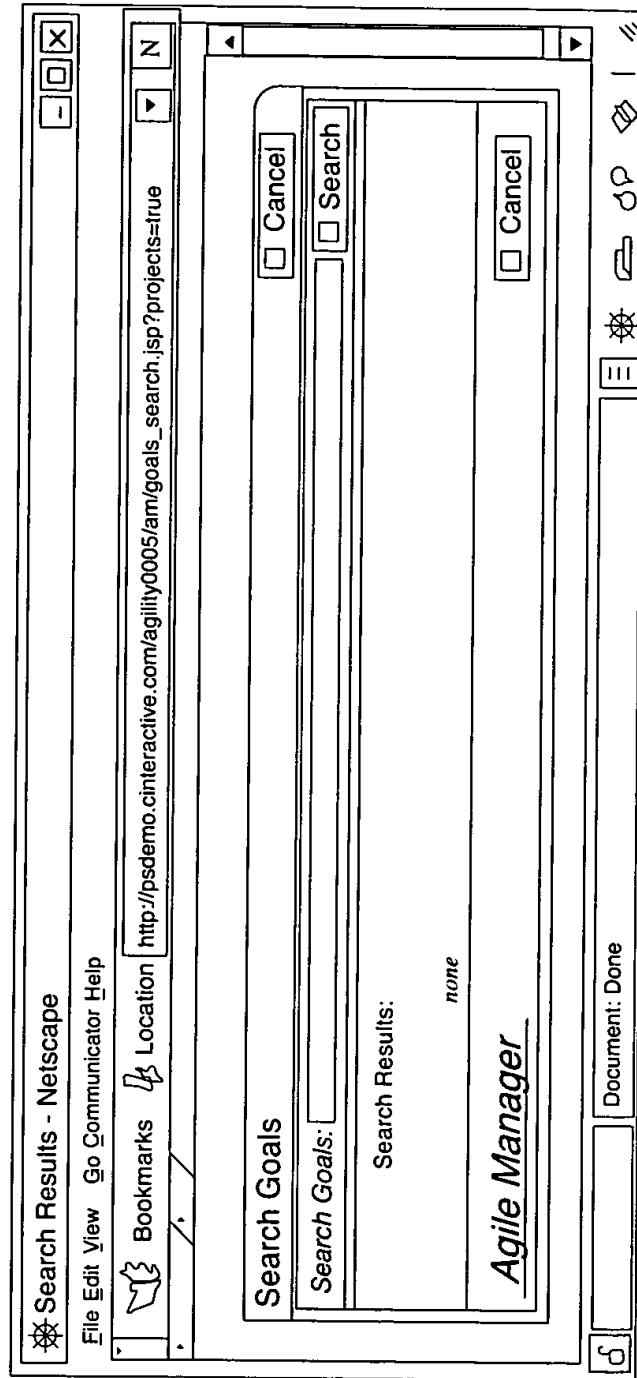


Fig. 25

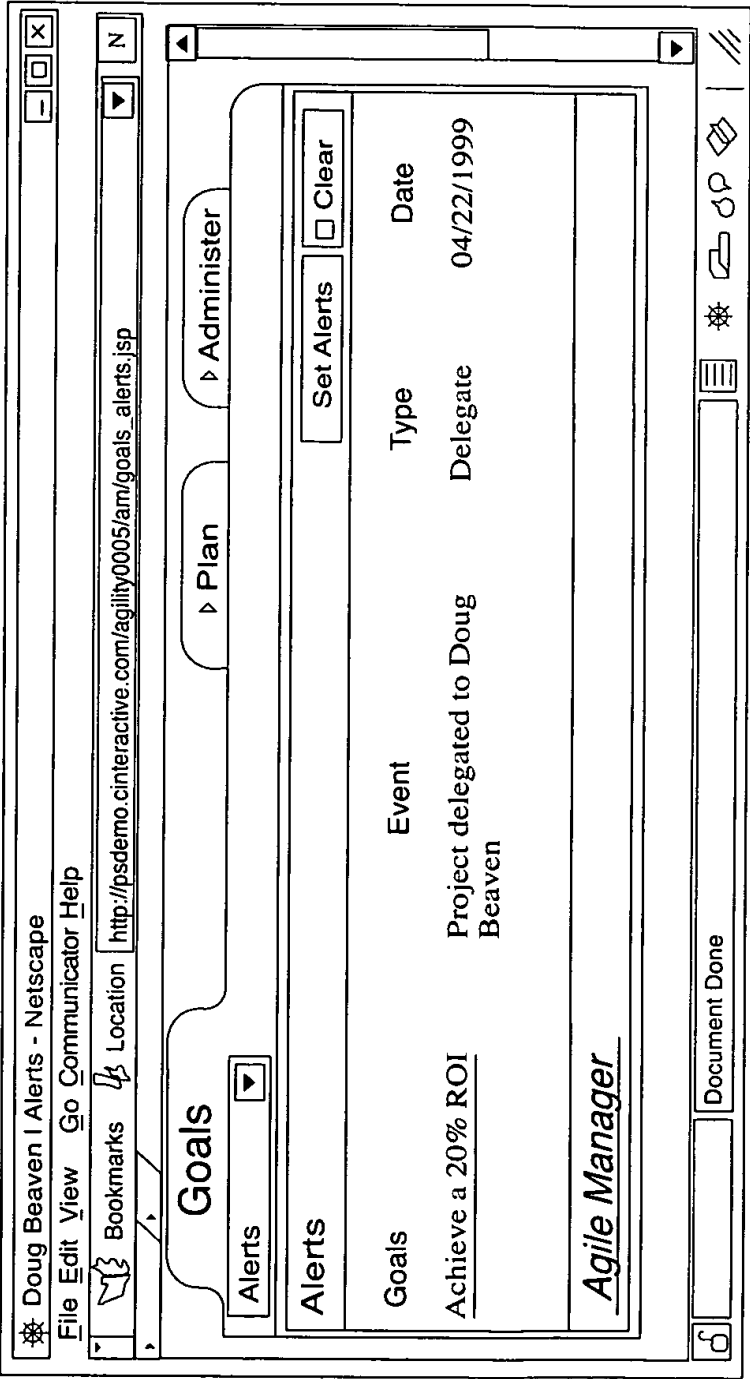
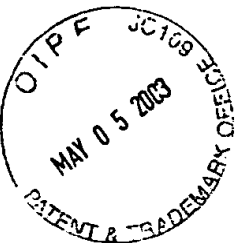
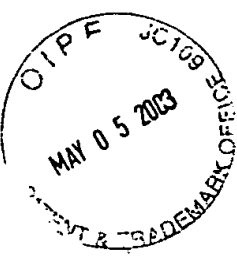


Fig. 26



Expand business with most profitable customers | Control Panel - Netscape

File Edit View Go Communicator Help

Bookmarks Location: om/agility0005/am/act_control.jsp?proj=PSCDB565336755E10D72391DBEA017F30

Control Panel

Act

Goals

Plan

Administer

Expand business with most profitable customers

Cancel

Submit

Access Control

	None	Read	Edit	Own
Everybody	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Group -	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Group -	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

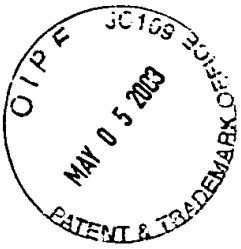
Cancel

Submit

Agile Manager

http://psdemo.sinteractive.com/agility0005/am/admin_profile.jsp

Fig. 27



28/40

Edit Achieve a 20% ROI - Netscape

File Edit View Go Communicator Help

Bookmarks Location http://psdemo.cinteractive.com/agility0005/am/goals_sorted.jsp

Edit Summary

Achieve a 20% ROI

Goal name

Goal Objective

Domain:

Status:

Due Date:

Actual Goal:

Desired goal:

Priority:

Risk:

Stage:

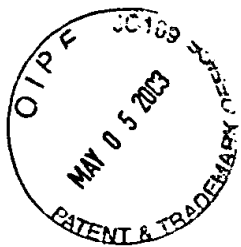
Investment:

Return:

Agile Manager

Document Done

Fig. 28



29/40

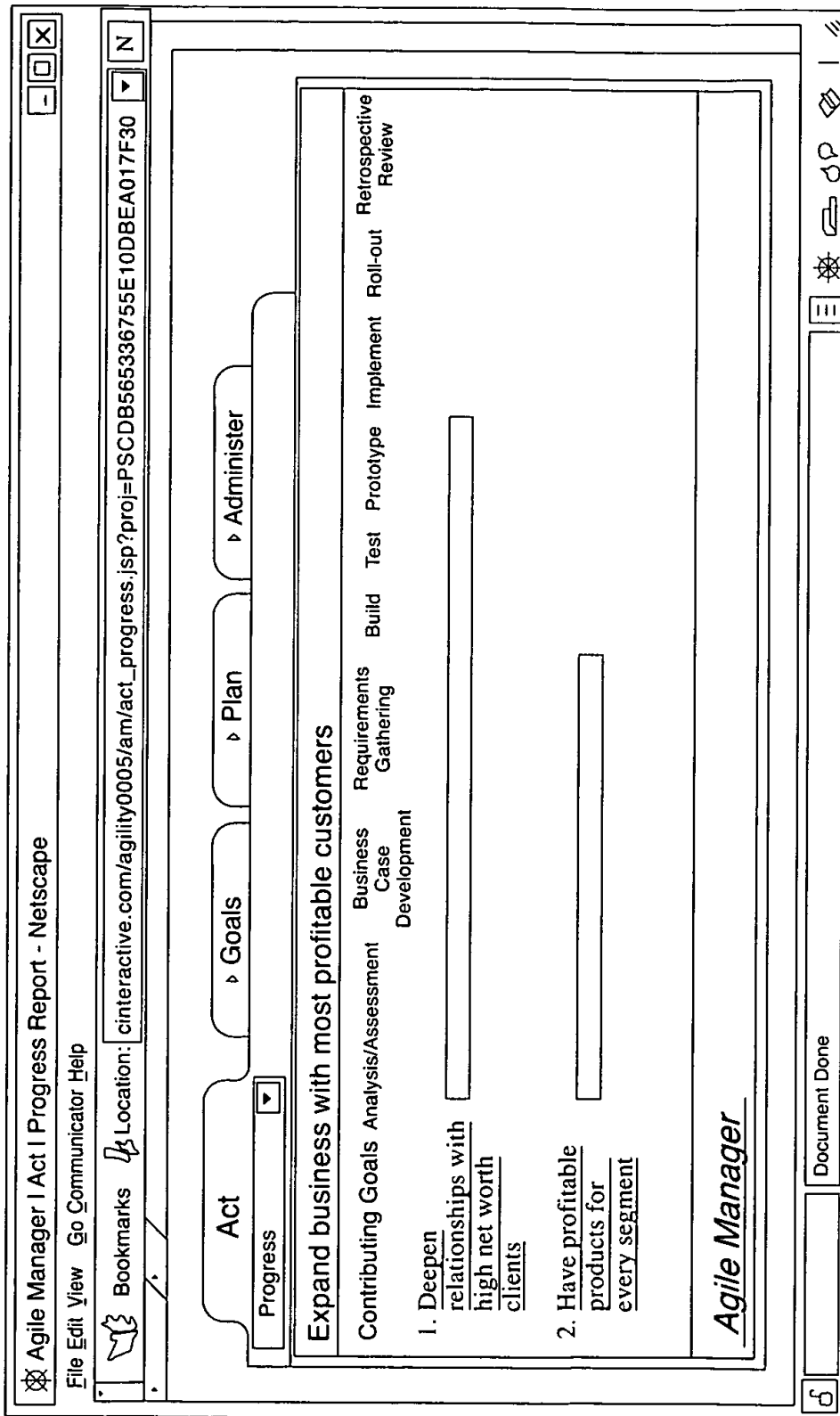
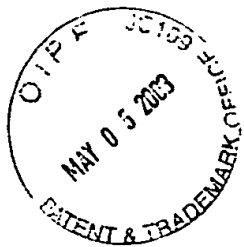


Fig. 29



30/40

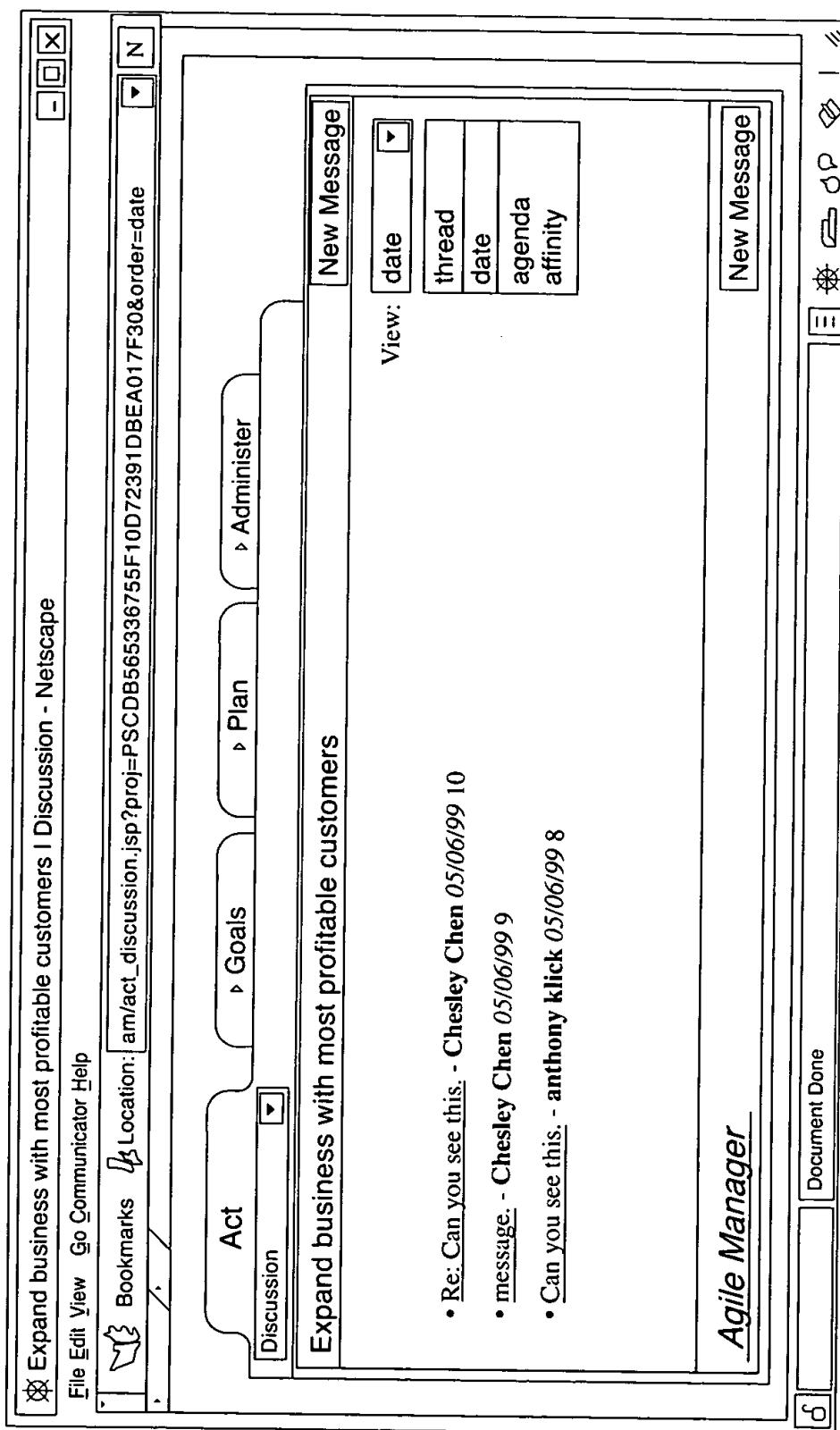
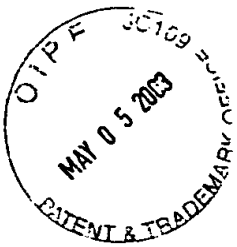


Fig. 30



31/40

Achieve a 20% ROI - Discussion - Netscape

File Edit View Go Communicator Help

Bookmarks Location 5/am/act_discussion_create?.jspproj+PSCDB565336755E10D72391DBEAD017F50 N

Post a New Discussion Message

Achieve a 20% ROI

Subject

Message

On the Agenda? ☒ Affinity Group: -Selected Group-
or, New Group:

Priority: 3

Agile Manager

Document Done

Fig. 31



32/40

Achieve a 20% HDI I Links I Edit - Netscape

File Edit View Go Communicator Help

Bookmarks Location 36755e10d72391BECd17F50&link-PSCDB556533674EB80D728ODOC9017E8G N

Edit your link

Achieve a 20% ROI

Edit your link information

Edit Link Name
CFO Magazine - Financial Conferences

Edit Link URL
<http://www.cfonet.com/conferen.html>

Or, upload a File:

Edit Link Description
Financial oriented conferences on topical issues facing many

Agile Manager

Document Done

Fig. 32

01 P E 35169 EUI-ECU
MAY 05 2003
PATENT & TRADEMARK

33/40

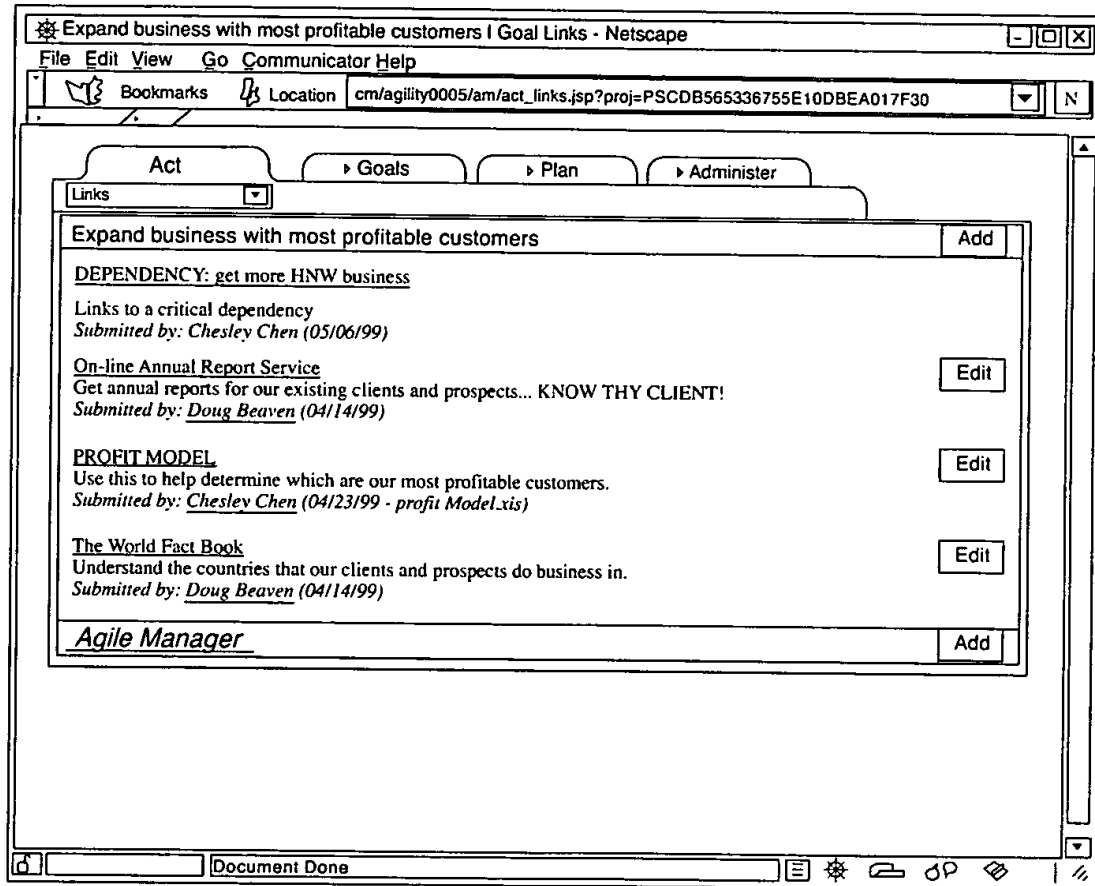


Fig. 33



EMPLOYEES ARE TREATED LIKE OWNERS

EMPLOYEES ARE TREATED LIKE AND COMPENSATED IN A MANNER REFLECTIVE OF OWNERSHIP RATHER THAN SERVITUDE.

"Employees [must] trust the company and believe changes are in their best interests." - Donald K. Clifford and Richard E. Cavanagh, *The Winning Performance*

High Performance

- Traits
- Relish change
- Fight inertia
- Clear strategy
- Customer driven
- Act like owners
- Treated like owners
- Reward risk taking
- Fact based decisions
- Value based decisions
- Effective systems
- Open to new ideas
- Adapt
- Process changes
- Constant improvement
- Fluid boundaries
- Teamwork
- Anti-bureaucracy
- Know business drivers
- Make alliances
- Focused clearly
- Industry trends & challenges
- Basic Information
- Feedback

	Strongly Disagree	Disagree	Slightly Disagree	Neutral	Slightly Agree	Agree	Strongly Agree	No Response
1. Managers in this company respect the rights of employees and treat them with dignity and respect.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Job objectives are aligned with the overall corporate vision.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Performance information is shared with employees so they stay focused on results.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Compensation and reward structures are aligned with company and/or unit performance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Fig. 34



✱ Achieve a 20% ROI - Delegate - Netscape

File Edit View Go Communicator Help

Bookmarks Location: /agility0005/am/act_delegate.jsp?proj=PSCDB565336755E10D72391DBEA017F50

Delegate-Select a New Owner

Achieve a 20% ROI

Search:

Agile Manager

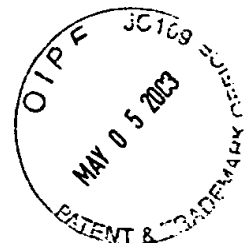
Document: Done

Fig. 34A



Act	Goals	Plan	Administer
Briefing			
Deepen relationship with high net worth clients			
<u>Expand business with most profitable customers</u>			
Cross sell and up sell our products to our existing client base from a position of strength.			
<u>DEPENDENCY: get more HNW business</u>			
Links to a critical dependency. (05/06/99)			
<u>On-line Annual Report Service</u>			
Get annual reports for our existing clients and prospects... KNOW THY CLIENT! (04/14/99)			
<u>PROFIT MODEL</u>			
Use this to help determine which are our most profitable customers. (04/23/99) - Profit Model.xls)			
<u>The World Fact Book</u>			
Understand the countries that our clients and prospects do business in. (04/14/99)			
<u>Top Notch Marketing Firm</u>			
Link to marketing 1 to 1 (05/12/99)			

Fig. 35



37/40

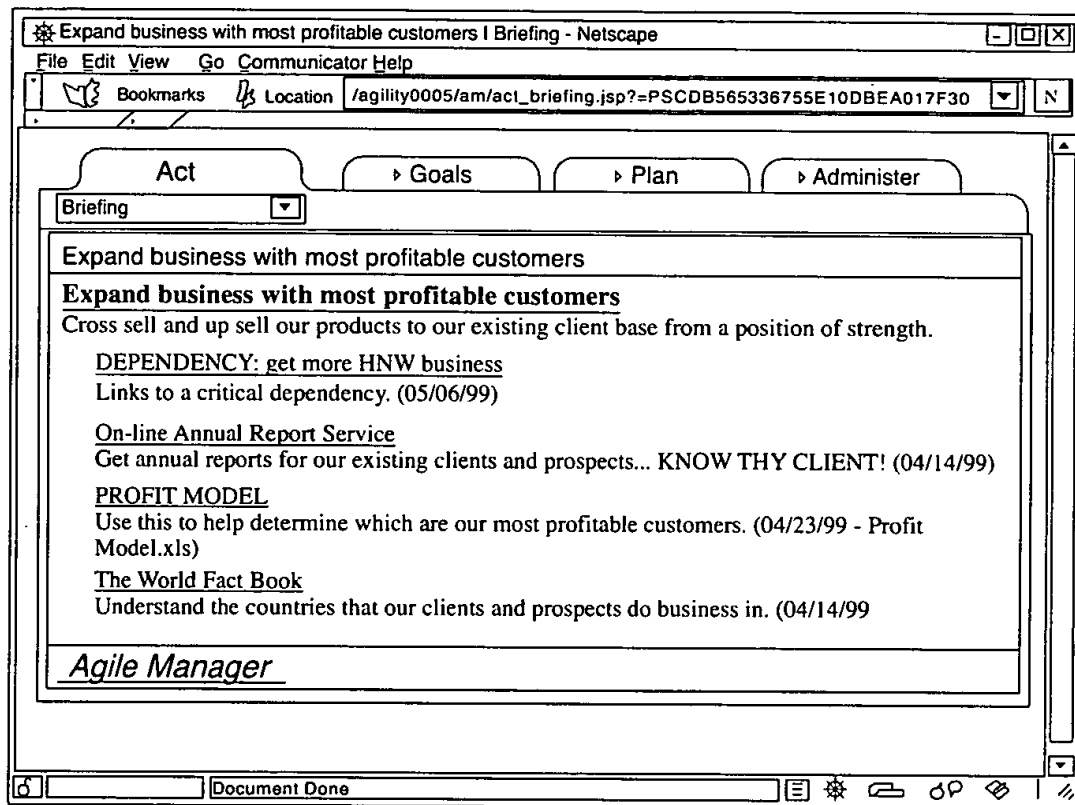


Fig. 36

OIPF JC109 EUBSU
MAY 05 2003
DELMARK

Expand business with most profitable customers | Components - Netscape

File Edit View Go Communicator Help

Bookmarks Location: y0005/am/act_discussion.jsp?proj=PSCDB565336755F10D72391DBEA017F30

Act

Components

Expand business with most profitable customers

Parent Goal: Select Parent

Subgoals:

- Deepen relationships with high net worth clients
- Have profitable products for every segment

Agile Manager

Goals Plan Administer

Add

Add

Document: Done

Fig. 37

⌘ Achieve a 20% ROI - Move - Netscape

File Edit View Go Communicator Help

Bookmarks Location: http://psdemo.cinteractive.com/agility0005/am/act_project_move.jsp

Select a new Parent

Achieve a 20% ROI

Search:

or Select from Project Hierarchy

Search Results:

Agile Manager

Document: Done

Fig. 38

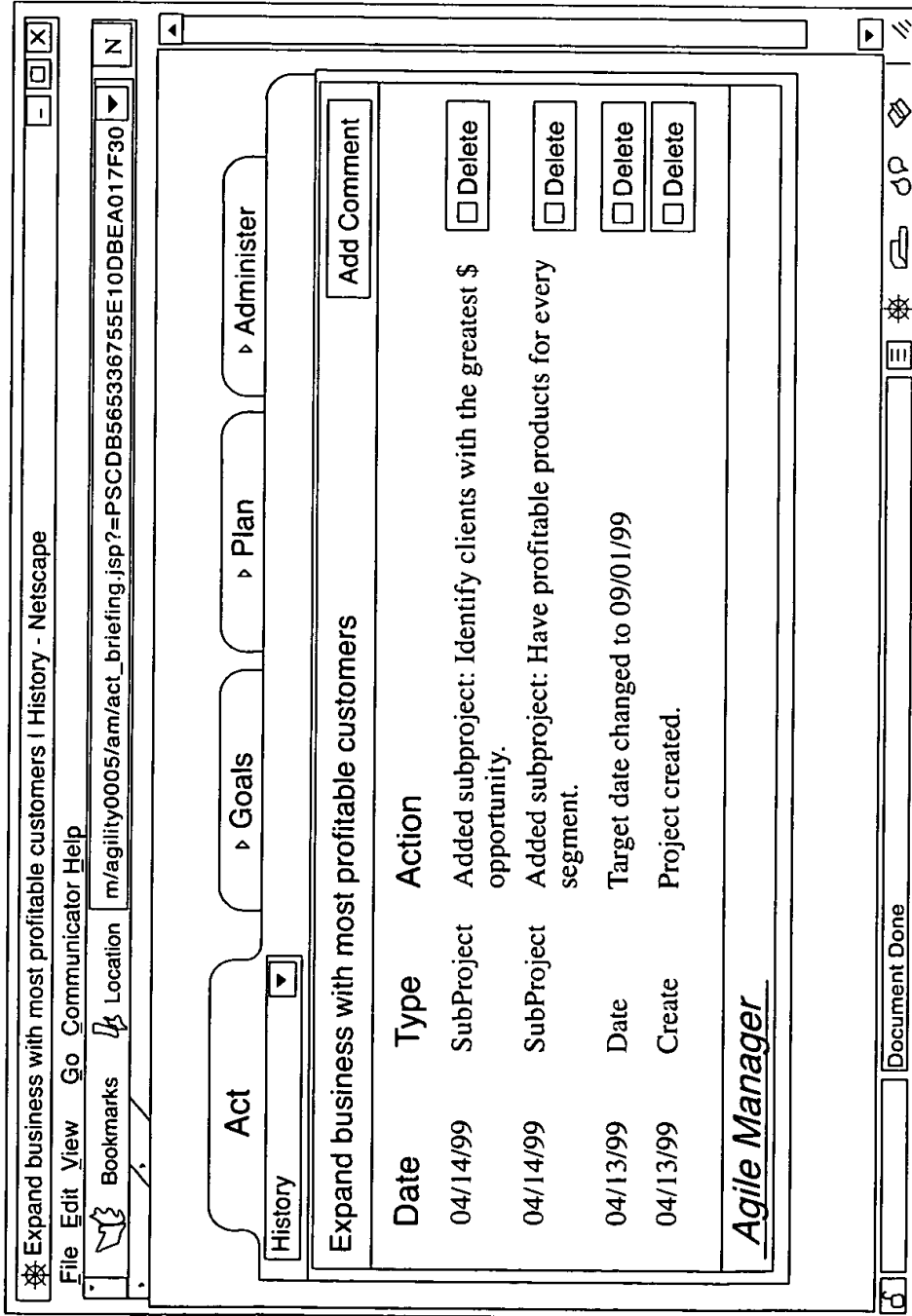
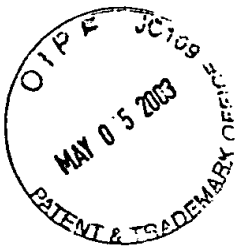


Fig. 39